

How do
we get to
Cascone?

BCBSF History and Archives DRAFT Project Proposal

**Created by:
BCBSF History and Archives Work Group**

Draft for comment
June 13, 2000

Background

Several market and societal forces are driving Blue Cross and Blue Shield of Florida to move at an ever-increasing faster pace to maintain our leadership position. As we continue to keep pace with technological advances, it is imperative that we make efforts now to preserve the company's rich history.

The BCBSF History Project Team is examining ways to capture and record the company's history. The proposed initiative will involve gathering memorabilia, files, proposals and reports; interviewing former executives and board members; and cataloging a significant amount of written and photographic material in a corporate archive. While more work needs to be completed before a definitive work plan is produced, this proposal details the groups' broad-based goals, approach and budget estimate to complete the project. The project team will develop a comprehensive work plan pending approval to proceed with and fund this initiative.

Goals

The goals of the history and archives project are to:

- Preserve our company's heritage – gain an appreciation of our corporate culture, understand our accomplishments and appreciate those who contributed to making BCBSF a strong, successful company;
- Communicate our company's story as appropriate to employees, the board of directors, retirees, customers, the public and the media;
- Create a corporate archives and establish processes to catalog and continually gather current and future company material including photographs, documents, publications and memorabilia;
- Gather oral histories to preserve corporate memories from a generation of retirees and long-service employees; and
- Use the Corporate Archives to leverage and reinforce the strength of BCBSF's brand.

Approach

The BCBSF History Project Team proposes a three-tiered approach to preserving our corporate history.

1. Establish a permanent BCBSF archive.
2. Capture verbal histories from current and former executives, board members and employees.
3. Determine the most appropriate ways to display archives and share the corporate history with employees, Board members, customers and the media.

Overview of Project Components

1. Create a Corporate Archives

The BRIC (Business Research Information Center) will take responsibility for establishing an official “Corporate Archives” program. The archives will serve as a centralized historical information research center and play a vital role in maintaining the continuity of — and capitalizing on — the richness of BCBSF’s heritage and values. The Archives staff will acquire, preserve and provide information from materials documenting the history of the company, its subsidiaries, employees, products, and policies. A major part of this effort will involve asking current and former board members, officers and employees to donate memorabilia they may have saved from their tenure with BCBSF.

During the archive creation phase, BRIC staff will:

- Develop a comprehensive archives policy. (Note: work on the draft policies and procedures is already underway.)
- Collect and preserve archival materials that illustrate the growth and development of BCBSF. (Note: A letter has already been sent to former board members asking them to donate or lend us BCBSF memorabilia as part of the project. Human Resources will send a similar letter to retired executives.) The BRIC staff will assist in actively locating and gathering records throughout the organization.
- Catalog, index, digitize. This includes creating a rational organizational scheme for storing the records that will facilitate retrieval in the future. A database will be created using the BRIC’s “Inmagic” software. Ideally, this database will be made available via the corporate Intranet.
- Provide adequate and appropriate conditions for the storage, protection, and preservation of archival material. This includes packaging materials in acid free boxes and storing them in a secure, climate-controlled location. All boxes and folders will be labeled for easy identification.
- Provide regular reference services to individuals interested in the activities and holdings of the Archives.

Resources Required

BRIC has already identified outside consultants who can assist in setting up the corporate archive. BRIC could work with this contractor approximately 20 hours per week during the initial start-up, archive design and cataloging phases. If BCBSF is committed to maintaining a permanent, ongoing archives program, BRIC will require a full-time employee to manage the archive going forward.

Other costs to set up the archive will be minimal. BRIC already has the software necessary to build the database and available space, shelving and PCs required to begin the project.

BRIC anticipates it will take at least ~~XX months~~ ^{10-12 months} to ~~create~~ ^{establish} a corporate archive. Anticipated costs for 2000 will be ~~\$45,550~~ ^{\$45,550} ~~presuming a part-time~~ ^{1-2 years} ~~engaging~~ ^{engaging}

2. Capture Oral Histories

According to an old African saying, "When an elder dies, it is as if an entire library burns down." The same could be said for preserving a corporate history. Presently, a large part of BCBSF's corporate heritage is preserved in the memories of former board members, executives and long-service employees. These memories are a perishable commodity; elements of which are lost every day. BCBSF can safeguard against losing more of its rich heritage by capturing its history through oral interviews with people who helped shape the company.

Now is the time to begin capturing these memories. Accordingly, the History Project Team ~~has identified two local historians who can help us.~~ ^{is currently identifying consultants/} While the historian can research and document the company's evolution from start-up to its current position as an industry leader, ~~the~~ ^{his} most valuable work will come from interviews with former executives, board members and employees. The historian, working with a member of the public relations and corporate communications staff, will conduct one-on-one and/or small group interviews over a six- to nine-month period to capture memories, anecdotes and stories about BCBSF's past. Interview schedules, discussion guides and other logistics will be developed as part of the History Project Work Plan.

Resources Required

It will take ~~one year~~ ^{at least 18 months} for an outside historian to research and write a corporate history, which would incorporate interviews with retirees and long-service employees. The estimated cost for these services is \$2,000 per month, or \$24,000 ~~for the year~~ ^{each}. This estimate does not include out-of-pocket expenses for videotaping, transcription and production of a finished yearbook, videotape or other alternatives to "package" the corporate history.

3. Identify Opportunities to Use History and Archives

Once the memorabilia is gathered, an archive formed and histories collected, the History Project Team will work with senior leadership to determine how BCBSF will use and preserve this material and information. Keeping in mind the goals of the project and BCBSF's corporate values, there are numerous ways to make good use of the material. Ideas such as videos, a corporate yearbook, multimedia presentations and a permanent "Wall of Fame" display have been discussed. The History Team will tie together several different approaches – for example, a "Wall of Fame" in the lobby, corporate yearbook and video – to

celebrate the company's rich history and successes with internal and external audiences. The project will certainly be used to celebrate the company's 60th anniversary in 2004.

Producing a written history, corporate video, "Wall of Fame" or other project display alternatives will be budgeted as part of the final work plan.

Efforts should be made to maintain an institutional history that would have more value from a leadership and managerial point of view. For this reason, the History Project should not be viewed as a single work product but a continuing process that will require a continuous commitment from senior leadership.

Total Cost Estimate and Timing

Phase 1: Create/Maintain a Corporate Archives

Activity	Item	Cost 2000	Cost 2001
Establish Archives in BRIC	<ul style="list-style-type: none"> Archivist to consult with BRIC staff -- 3 days per week 	\$2,000	\$1,500
	<ul style="list-style-type: none"> Additional License for DBText Database Software 	\$1,000	
	<ul style="list-style-type: none"> Part-time Project Manager (with benefits) Full-time position - Level 12E (with benefits) 	\$30,000	\$60,000 \$75,000
	<ul style="list-style-type: none"> Archival Supplies – binders, folders, preservation of pictures, etc. 	\$1,000	\$3,000
	<ul style="list-style-type: none"> 4-42" 5-drawer Lateral Files, Shelving 	\$2,600	\$3,000
Photo Displays for Lobby, Outside 101A and hallway to BRIC	<ul style="list-style-type: none"> Frame 100 photos, mixture of 8 ½ x 11 and 11x14. @ \$30 each 	\$3,000	\$1,000
Annual Retiree Dinner	<ul style="list-style-type: none"> Special Display, Activities, etc. 	\$500	\$500
Luncheons (2) for BCBSF employees with 25 and 30 years of service	<ul style="list-style-type: none"> To identify old photos and brainstorm ideas for more activities 2 luncheons @ \$100 each 	\$200	
BRIC Staff visit to Local company archive	<ul style="list-style-type: none"> Walt Disney World-learn how they handle their video and photo collection-1-day trip for 3 staff 	\$250	
TOTAL		\$45,550	\$69,000
			- PT
			\$84,000
			- FT

Options: This budget funds either a ½ time or full-time position. Preference is for a full-time position, but we could proceed slowly with a half-time position.

Phase 2: Capture Oral History

Activity	Item	Cost 2000
Hire consultant to conduct [how many??] interviews, research, and write history	<ul style="list-style-type: none"> \$2000 per month for an average of 12 months 	\$24,000
Travel		
TOTAL		\$24,000

Phase 3

The following estimates to . Final cost will depend on how history is “packaged” and related production costs as well as how and where memorabilia is displayed.

Activity	Item	Cost 2001
Videotape	Create a high quality 15 minute video, using as existing footage and b-roll as possible, with new voiceover, music and graphics	\$22,500 to \$30,000
Wall of Fame		
Yearbook		\$ 30,000
TOTAL		

Next Steps

1. Gain approval from senior leadership
2. Prepare detailed project plan and accountabilities.
3. Engage outside consultants/resources.
4. Prepare comprehensive budget.

[Other steps to be determined by work group]